HANSEN
POWER THE NEXT.™

HANSEN TECHNOLOGIES

Capital Markets Day

18 May 2021

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- should be read in conjunction with Hansen's financial reports and market releases on ASX
- includes forward-looking statements about Hansen and the environment in which Hansen operates, which are subject to significant uncertainties and contingencies, many of which are outside the control of Hansen – as such undue reliance should not be placed on any forward-looking statements as actual results or performance may differ materially from these statements
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All dollar values are in Australian dollars (A$) unless otherwise stated.

Definitions

- 1H20 = six months ended 31 December 2019
- 2H20 = six months ended 30 June 2020
- FY20 = financial year ended 30 June 2020
- 1H21 = six months ended 31 December 2020
- 2H21 = six months ended 30 June 2021
- FY21 = financial year ended 30 June 2021
- Reported EBITDA* = Earnings before interest, tax, depreciation and amortisation, excluding net foreign exchange gains (losses)
- Underlying EBITDA* = Earnings before interest, tax, depreciation and amortisation, excluding net foreign exchange gains (losses), not including non-recurring items
- NPAT = Net profit after tax
- NPATA* = Net profit after tax excluding tax effected amortisation of acquired customer and technology intangibles

*EBITDA, EBIT, NPATA, Recurring revenue and Non-recurring revenue are non-IFRS measures that have not been audited or reviewed by Hansen's auditors

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CAPITAL MARKETS DAY SESSIONS AND PRESENTERS.

A DETAILED DIVE INTO KEY ELEMENTS OF THE HANSEN TECHNOLOGIES STORY.

Sessions

1 History and strategy
(8.00am – 8.30am AEST)

1. History of Hansen.
2. Track record of delivery.
3. Targets for the future.
4. Experienced management.
5. Strategic pillars.

2 Technology
(8.30am – 9.30am AEST)

1. Our technology offerings.
2. Our innovation model.
3. Our technology landscape.
4. Three themes of technology roadmaps: 1) Digital, 2) Energy, 3) Telco.

3 Acquisition growth
(9.30am – 10.00am AEST)

1. Identify opportunities.
2. Evaluate opportunities.
3. Complete acquisitions.
4. Integrate acquisitions.
5. Drive value on an ongoing basis.
6. Case study (Sigma Systems acquisition).

Presenters

Andrew Hansen, CEO

Graeme Taylor, CFO

Malcolm McNab, Head of Investor Relations

Guy Tennant, CTO

Cameron Hunter, COO

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History and strategy

18 May 2021

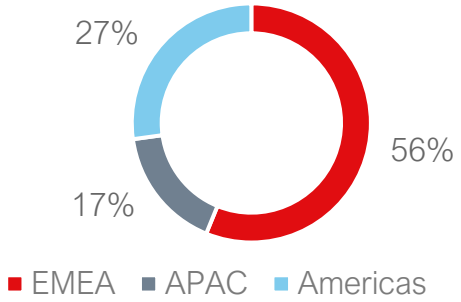
HANSEN.

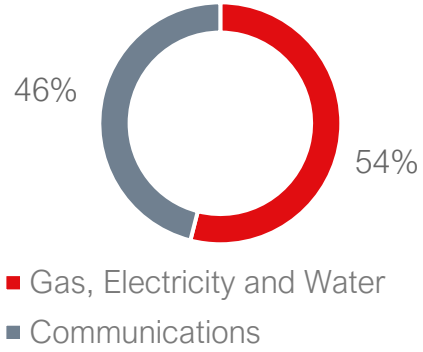
A global technology company serving the Gas, Electricity, Water and Communications industries.

600+
Customers Globally

80+
Countries

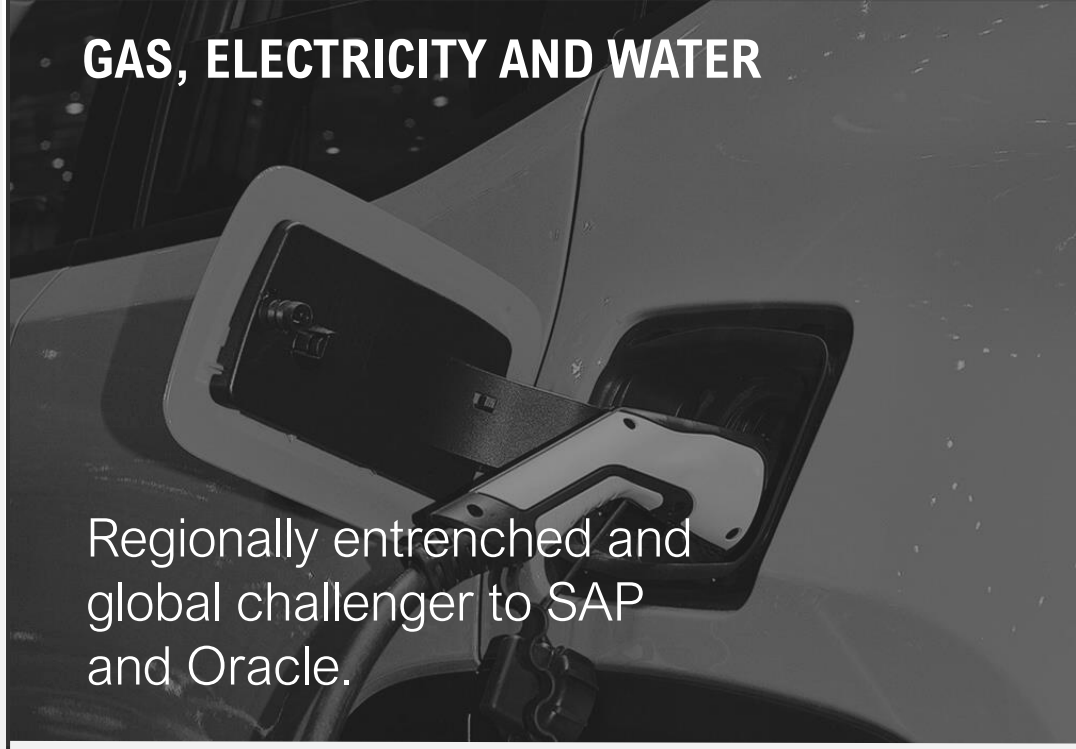
Tier 1 and 2 customers





CREATE-DELIVER-ENGAGE

We develop and implement purpose-built software enabling our customers to **create** and bring to market new products and services faster, **sell and deliver** them flawlessly to customers and **engage** meaningfully at all points of customer interaction.



THE HANSEN MISSION.

To further grow our best-in-class core business through aggregating mature, entrenched and predictable businesses in the energy and communications sectors.

OUR STRATEGY.

Leverage our global experience

- Leverage new and existing technologies
- Cross-sell

"Hansenisation" of aggregated businesses

- Deploy proven and agile technology methodologies
- Predictable management and systems

Diversification

- Vertical, geographic and customer diversification

Future opportunities

- A disciplined approach to further aggregation opportunities

50-YEAR TRACK RECORD IN TECHNOLOGY.

DRIVEN BY MANAGEMENT WITH >17 YEARS WITH THE COMPANY ON AVERAGE.

Beginnings

- Founded in 1971 to focus on the management of customer and organisational data.
- Beginning with one customer where we didn't own the IP, we shifted to owning our own IP and expanding customer numbers.

Diversification

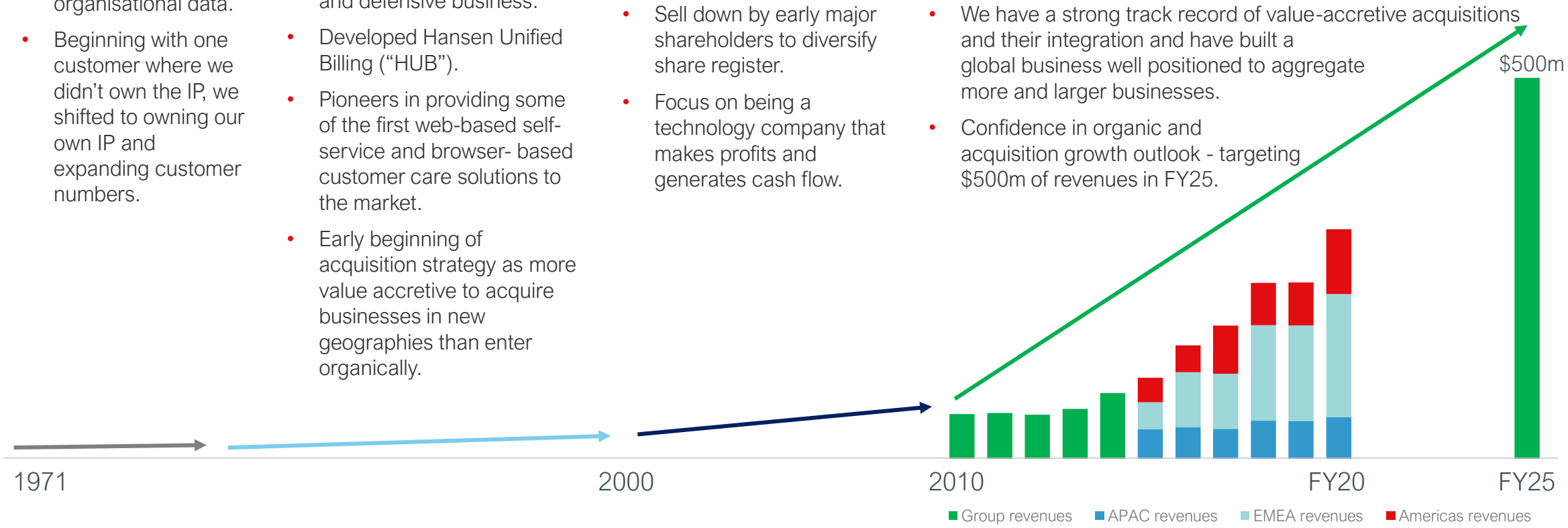
- Diversified across customers, geographies and verticals to create a well-diversified, predictable and defensive business.
- Developed Hansen Unified Billing ("HUB").
- Pioneers in providing some of the first web-based self-service and browser- based customer care solutions to the market.
- Early beginning of acquisition strategy as more value accretive to acquire businesses in new geographies than enter organically.

Public company

- IPO of Hansen Technologies in 2000 driven by existing management team.
- Sell down by early major shareholders to diversify share register.
- Focus on being a technology company that makes profits and generates cash flow.

Aggregation acceleration

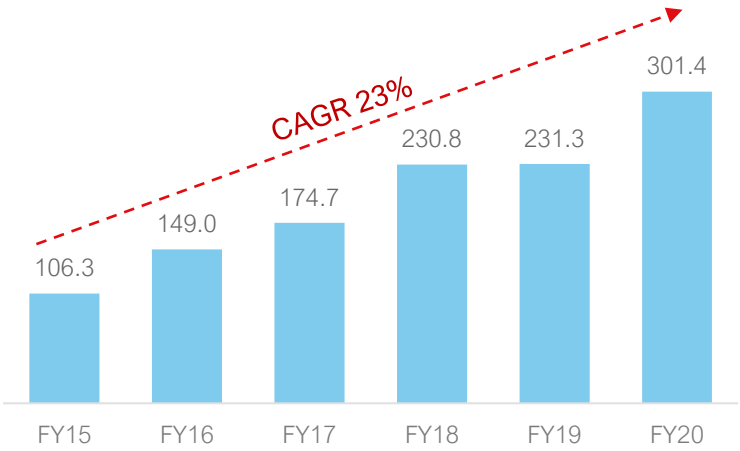
- Rapid growth with revenue CAGRs of around 25% through several progressive and strategic acquisitions that have expanded our geographic scope and enhanced the business of our valued customers in our existing verticals.
- We have a strong track record of value-accretive acquisitions and their integration and have built a global business well positioned to aggregate more and larger businesses.
- Confidence in organic and acquisition growth outlook - targeting $500m of revenues in FY25.



AN EXCEPTIONAL FINANCIAL TRACK RECORD.

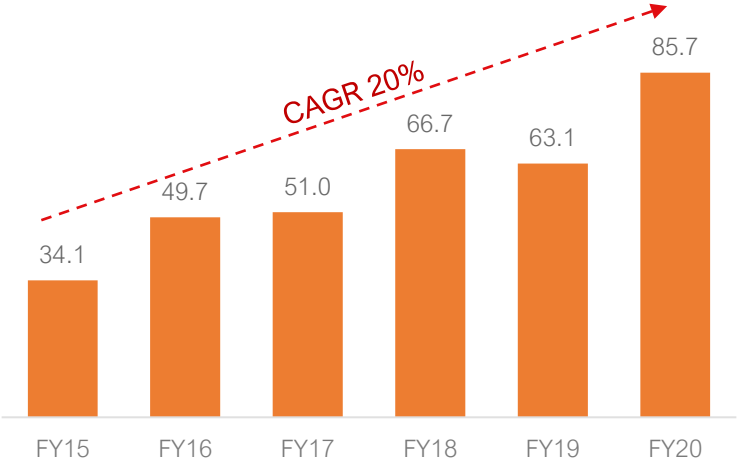
LONG-TERM SHAREHOLDER VALUE CREATION.

REVENUE ($M)



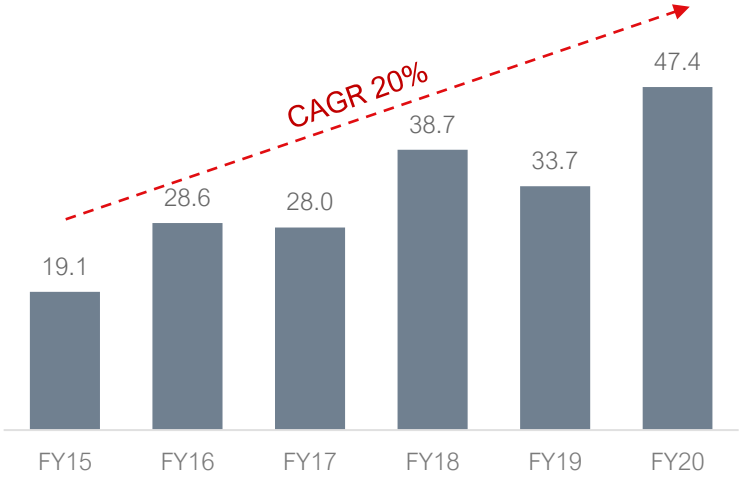
- Strong growth in revenues over time through customer wins and value-accretive acquisition growth.
- Occasional large one-off licence revenues contributing to some "lumpiness" in revenues, with shift to recurring revenue a continued focus.
- Revenues from our owned IP of 97%.
- Targeting $500m in revenues by FY25.

UNDERLING EBITDA[1] ($M)



- EBITDA growth driven by operating leverage and cost reductions.
- Cost efficiencies through COVID including reduced travel and productivity gains from working from home (much of these gains expected to be maintained "post-COVID")
- Efficiencies also from regional management and Indian and Vietnam development centres.
- FY21 EBITDA driven higher through accounting recognition of Telefonica (Germany) contract; long-term EBITDA margin target of 32% - 35%

UNDERLYING NPATA[1] ($M)



- Tax rate driven by geographic spread of revenues and utilization of acquired tax losses.
- Applying "Hansenisation" to acquired companies and broad cost reductions, margins have been improved.
- Significant pay-down of debt reducing interest rate margin and cash burden in recent years.

Notes:
1. Underlying EBITDA / NPATA is EBITDA / NPATA adjusted for non-recurring items on an IFRS16 basis.

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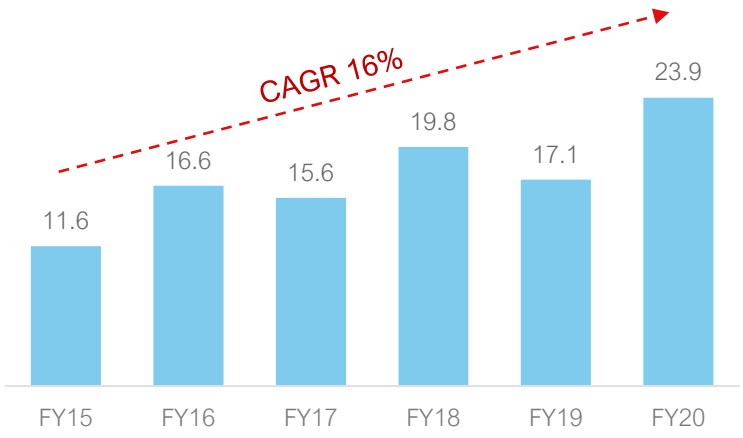
AN EXCEPTIONAL FINANCIAL TRACK RECORD.

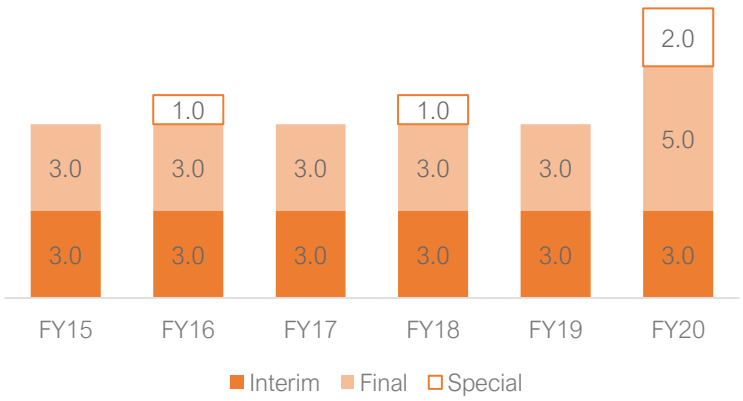
LONG-TERM SHAREHOLDER VALUE CREATION.

EPSa[1] (Cents)



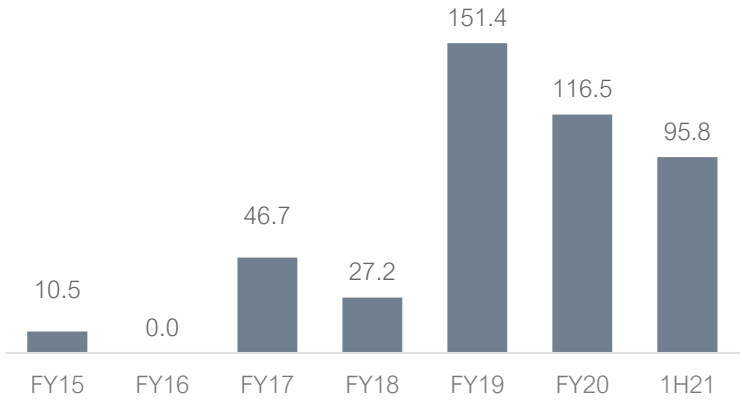
- Use of debt to grow EPS by managing cost of capital.
- Group margin expansion driving significant EPS upside.

DPS (Cents)



- Dividend decision driven by cash remaining after value-accretive investment opportunities.
- Returning excess cash to shareholders flexibly; as and when acquisition growth opportunities are executed, dividend may be reduced from historic levels to allocate capital to our acquisition growth strategy.

NET DEBT[2] ($M)



- Strong cash flows, capital structure and liquidity position with significant recent reduction in net debt.
- 1H21 Free Cash Flow conversion[3] of 65%.
- At 1H21 net debt was reduced to $95.8m (leverage ratio[4] = 1.03x at 31 December 2020).
- Significant headroom for more aggregations with board comfortable at 3.0x – 3.5x net debt to EBITDA.

Notes:
1. Adjusted Basic EPS, based on Underlying NPATA.
2. Net Debt excluding AASB 16 lease liabilities and pre-paid borrowing costs.
3. Free Cash Flow conversion is Gross FCF as a % of Underling EBITDA.
4. Leverage ratio: net debt (including pre-paid borrowing costs) / EBITDA excluding impact of IFRS16 and non-recurring items.

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FINANCIAL OUTLOOK AND LONG-TERM TARGETS.

A STRONG FY21 OUTLOOK AND CLEAR PATHWAY TO GROWTH TO FY25.

FY21 outlook

1 **Revenue**
- $316m - $326m (constant currency)
- $306m - $316m (reported)

2 **EBITDA margin**
- 37% - 39% (underlying)

Long-term financial targets (FY25)

1 **Revenue**
- $500m

2 **EBITDA margin**
- 32% - 35% (underlying)

3 **Gearing**
- Maximum <3.5x net debt/EBITDA (depending on aggregations).

4 **Dividends**
- 10c annual base with any excess cash returned via special dividends (depending on aggregations).

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DEEPLY EXPERIENCED MANAGEMENT TEAM.

AVERAGE MANAGEMENT TENURE AT HANSEN OF >17 YEARS.

Andrew Hansen, CEO

- IT executive with over 30 years of experience, including management of mid to large size organisations, corporate development, business operations, and strategy.
- Joined Hansen Technologies in 1990, and quickly began to transform the business and then ASX listed the company in 2000.
- Leads the strategic direction of the business with a dedicated and diverse team of over 1500 industry experts.

Julia Chand, General Counsel and Company Secretary

- Joined Hansen Technologies in 2007 and plays a strategic role as General Counsel as well as Company Secretary.
- Significant legal experience in IT, financial services and retail organisations.

Graeme Taylor, CFO

- Over 30 years' experience in both operations and finance.
- With a Finance Degree and post graduate qualifications, Graeme has earned the title of CPA.
- He has worked throughout the Oceania Region, USA and Europe and has significant experience developing International reporting and management systems. His strong commercial knowledge brings a unique approach to his role as CFO.

Faye Aylward, Global Human Resources Director

- Joined Hansen in 2015, bringing experience from South Africa, the UK and Australia in Talent Acquisition and Outsourced HR consulting.
- With a background in Organisational Psychology and Communication Science, Faye has an extensive experience within the consulting, financial services, retail and software development industries.

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DEEPLY EXPERIENCED MANAGEMENT TEAM.

AVERAGE MANAGEMENT TENURE AT HANSEN OF >17 YEARS.

Cameron Hunter, COO

- Joined Hansen in 1987.
- He manages operations across Hansen's business units and has played a major role in the global growth of the company across the software and IT outsourcing business units.

Scott Weir, President EMEA

- Joined Hansen in 2007 as European Director, bringing over 20 years' experience in the Telecoms, Utilities and Pay-TV industry.
- Previously, Scott held several senior roles at NTL (now Virgin Media), BBC and Scantrack Healthcare Systems with a focus on project delivery, leadership and operational efficiency.

John May, President Americas

- Joined Hansen in 2000.
- He has over 25 years of leadership experience in a variety of industries and geographic markets, including managing large IT implementations.
- Prior to Hansen, John served as the CEO of Baseball Australia, held franchising responsibilities for Jardine Matheson in Australia, Canada and South East Asia and served as the CEO for Australia's highest profile football club.

David Castree, President APAC

- Appointed President, APAC in July 2018.
- He joined Hansen Technologies in 2009, bringing years of expertise as a Programme Manager and IT consulting specialist with a deep understanding of client, people, project, and financial management.

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DEEPLY EXPERIENCED MANAGEMENT TEAM.

AVERAGE MANAGEMENT TENURE AT HANSEN OF >17 YEARS.

Darren Meade, Chief Delivery Officer

- With more than 30 years at Hansen, Darren Meade oversees the technical and architectural direction of the organisation's software solutions.
- He has a long history delivering customer care and billing solutions and has a programming background in multiple languages and operating systems.
- Prior to joining Hansen, Darren managed large development and project delivery teams for organisations such as Telstra and Worldcom.

Guy Tennant, Chief Technology Officer

- Joined Hansen in 2013, having spent the bulk of his career managing product development for Digital Service Providers: TV broadcasters; ISPs; Telcos, and content owners.
- Guy has held various technology leadership positions while living in London, Amsterdam and Johannesburg, and has experience working for software vendors (Irdeto, Entriq), as well as operators (Sky Group and Naspers Multichoice).

Glenn Gibson, Chief Marketing Officer

- Became Hansen's CMO in December 2019 and was previously VP of Marketing for Sigma Systems (acquired by Hansen in May 2019).
- Glenn brings over 20 years of combined marketing experience within the communications, technology and software industries.
- Before joining Sigma Systems, he was Head of Marketing at Juniper Networks Canada. He has also held various roles at Sprint and Amdocs.

Matt Gurrie, Chief Information Officer

- Joined Hansen in 2016, bringing experience from a number of large complex technology organisations with experience in integration and divesture of acquisitions.
- Prior to Hansen, Matt worked at Orica, Australia Post, Officeworks and Coles, managing various multi-disciplined technology and business transformation projects.

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DEEPLY EXPERIENCED MANAGEMENT TEAM.

AVERAGE MANAGEMENT TENURE AT HANSEN OF >17 YEARS.

Bobby Slaton, Head of Global Strategic Sales

- Responsible for engaging with energy, utilities and telecommunications service providers globally ensuring Hansen is well-positioned to continue its rapid growth worldwide.
- With over twenty years of experience in the utilities, energy and telecommunications industries, prior to joining Hansen Bobby held an array of senior leadership roles at Ventyx, Sumtotal Systems and 4Tell Solutions.

Karen Sharpe, Director Learning Academy

- Karen is responsible for people development within Hansen.
- Karen brings extensive experience in the growth and development of technology training business units across multiple geographies internationally and leadership of multi-disciplinary culturally diverse teams.

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THE DRIVERS OF OUR SUCCESS.

LONG TERM VALUE ACCRETIVE AGGREGATION OF MATURE, ENTRENCHED, AND PREDICTABLE BUSINESSES.

1 Best in class customer care, billing and product catalogue solutions	• Strong, profitable, cash generative, underlying business. • Mission critical software, database of record for products and customers. • Modern and feature-rich evolving applications.
2 Hansen Future Opportunities	• Competitors still fragmented and regionalized. • COVID-19 will provide further opportunities. • Vigilant, disciplined and focused on best, most value-accretive aggregations.
3 Successful aggregation strategy	• 20-year record of successful, targeted business aggregations. • Industry and regional focused expansion. • “Bulls Eye”: industry, region, IP in systems supporting product, customers and billing.
4 The ‘Hansenisation’ approach	• Deploying proven processes and methodologies. • Margin optimization via integration and proven best practices.
5 Our global diversification	• Two industries. • 80 countries. • 600+ customers across 16 product lines.

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1. BEST IN CLASS PROVIDING END TO END CUSTOMER CARE, BILLING AND PRODUCT CATALOGUE SOLUTIONS.

CREATE, INNOVATE, DEFINE

Build new and bundled to market in days not months

CUSTOMER ACQUISITION & FULFILLMENT

Customer lifecycle – including pricing, quoting, acquisition and fulfillment

BILLING, RATING AND DATA CAPTURE

Aggregating usage from metering systems, networks and partners, pricing and rating, billing, accounts receivable, payment

CUSTOMER CARE RETENTION & ENGAGEMENT

Increasing customer understanding and engagement through multichannel communication and analytics

Leverage all aspects to ensure customers can thrive and be future-proofed with Hansen.

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1. BEST IN CLASS PROVIDING END TO END CUSTOMER CARE, BILLING AND PRODUCT CATALOGUE SOLUTIONS.

STRATEGICALLY SIGNIFICANT RECENT LOGO WINS.

EXPANDED DOMINANT NORDIC POSITION

CLOUD & PRODUCT EVOLUTION

DIGITAL SERVICE ENABLEMENT

AGILE INNOVATION & 5G ENABLEMENT

fortum
LUMME ENERGIA
Entelios
ELENIA

AT&T
REGINA
nuuday
auroraenergy
M7

westernpower
Simplyenergy by ENGIE
stc

dish
Telefonica
M7
SmarTone
ciena
VOCUS communications
LIBERTY LATIN AMERICA
airtel

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2. HANSEN FUTURE OPPORTUNITIES.

A DISCIPLINED APPROACH TO AGGREGATION OPPORTUNITIES.

WHAT WE ARE LOOKING FOR	HOW WE EVALUATE IT	HOW WE GO ABOUT IT
• Focus will be on robust and mission critical existing verticals. • Ownership of IP. • Regional expansion or leverage. • Complementary applications. • Potential other verticals.	• We evaluate each opportunity with the same successful approach deployed over 20 years. • Profit and loss under our management methodologies. • We are uncompromising on strategic and financial rationale. • We don't fall in love.	• Capital management, knowing our capacity. • Clear internal buy in. • Integration planned during due diligence to hit the ground running.

Businesses which will benefit from Hansenisation and enhance our core competency.

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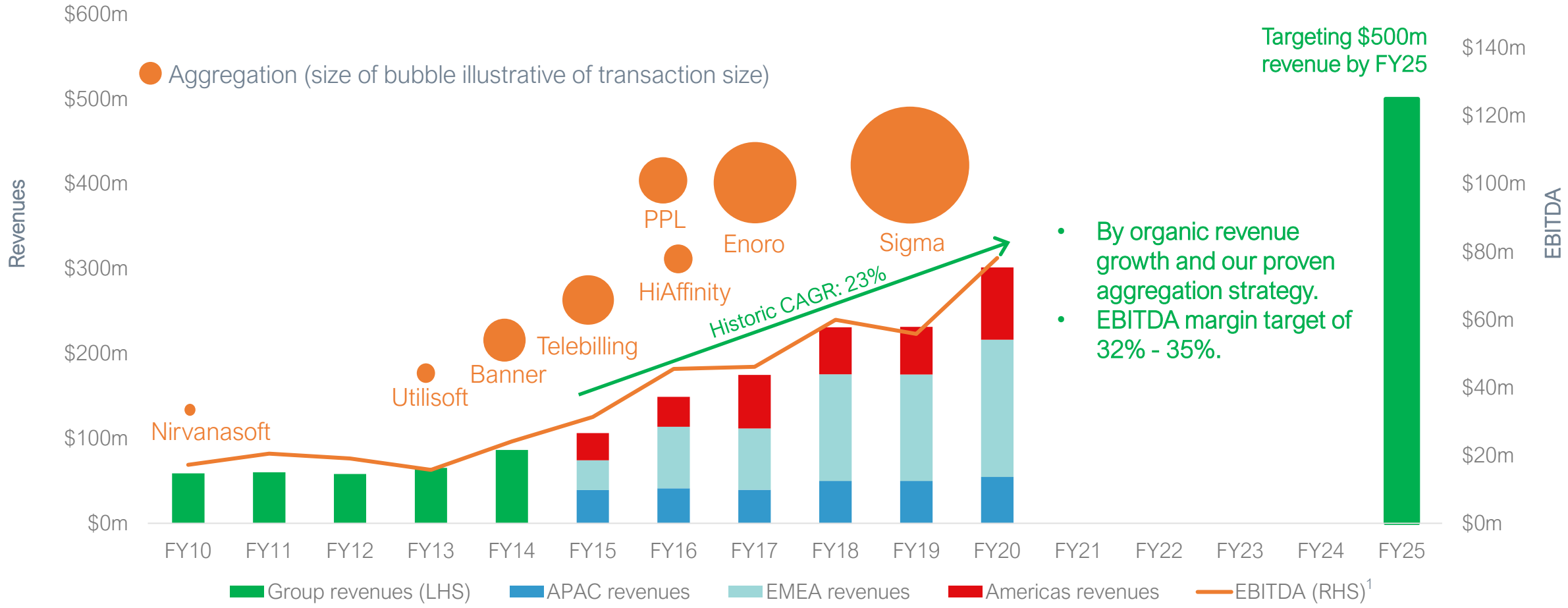
3. SUCCESSFUL AGGREGATION STRATEGY.

WE ARE TARGETING $500M REVENUE BY FY25 BUILDING ON OUR LONG TRACK RECORD OF GROWTH.



- By organic revenue growth and our proven aggregation strategy.
- EBITDA margin target of 32% - 35%.

Notes:
1. EBITDA presented as EBITDA adjusted for non-recurring items and net foreign exchange gains (losses).

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4. THE 'HANSENISATION' APPROACH.

PROVEN ABILITY AND PROCESSES TO DRIVE VALUE ACCRETIVE AGGREGATION.

DRIVE YIELD EXPANSION AND OPERATING LEVERAGE

- Identify margin improvement during initial engagement.
- Price businesses as stand alone, margin improvements not priced in.
- 30, 90, 360 days post closing.
  - 30 days messaging to staff and customers.
  - 90 days reporting to talk the same language.
  - 360 days goal for full integration.
- Relying on over 40 years of industry experience to consistently exceed our customer expectations, driving both retention and upside services.

CORPORATE GOAL

- Aggregate a mature and predictable customer base.
- We don't just aggregate, we integrate to leverage knowhow and assets.
- Drive margins to Hansen Group level.

FURTHER OPPORTUNITIES

- Broaden foundation.
- Deepen talent pool.
- De-risk single point.

Ensure newly acquired customers and employees can thrive and be future-proofed with Hansen.

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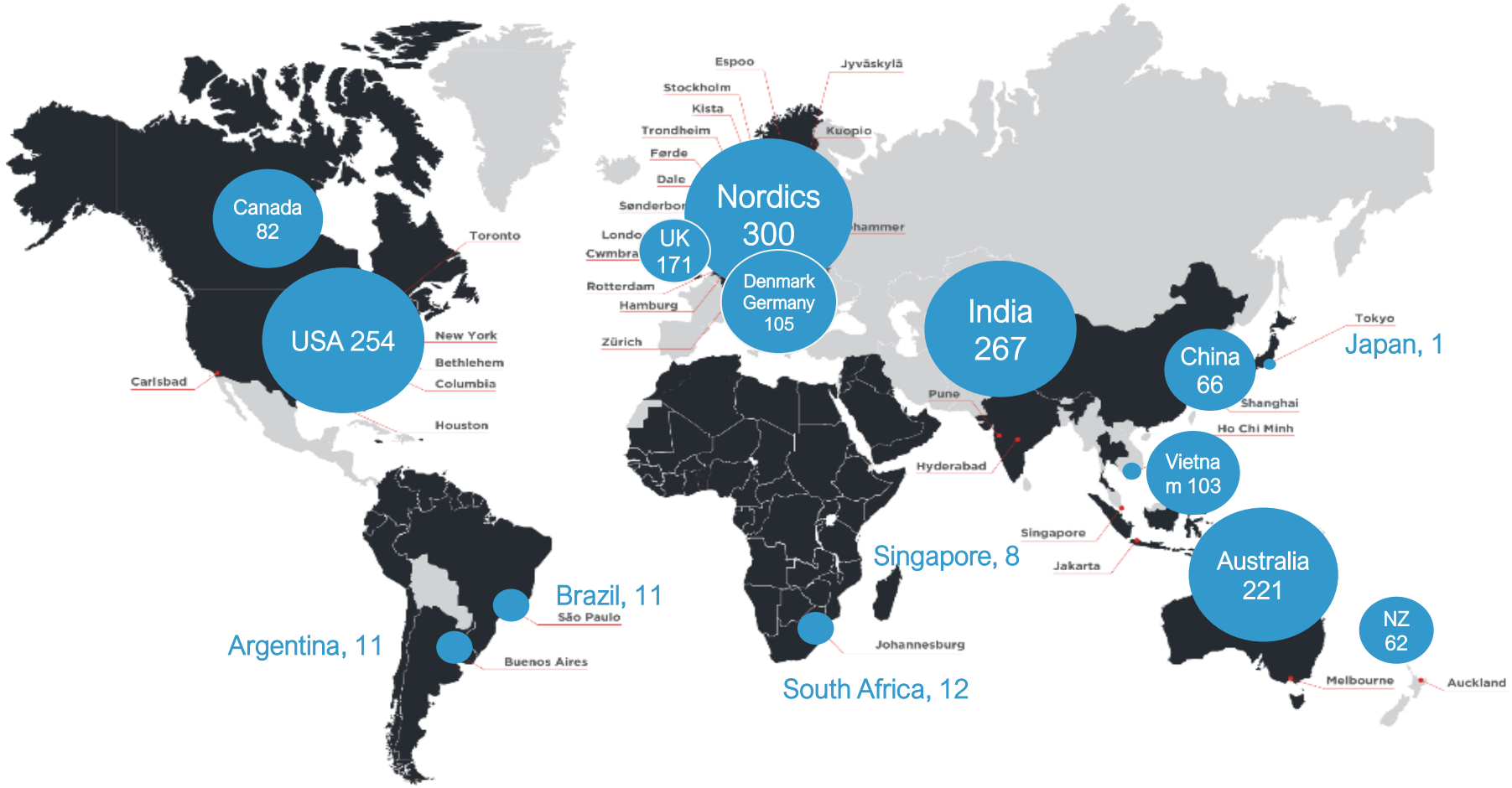
5. OUR GLOBAL DIVERSIFICATION.

GLOBAL PLATFORM MITIGATES RISK AND CREATES GROWTH OPPORTUNITIES.



HANSEN EMPLOYS OVER 1400 STAFF GLOBALLY ACROSS 33 OFFICES

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Q&A

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Technology

18 May 2021

HANSEN INNOVATION MODEL.

MULTI-DIMENSIONAL APPROACH DELIVERS INNOVATION

ACQUIRE

- A cornerstone of Hansen's corporate strategy is to acquire innovative products.
- Create synergies through integration of best of breed solutions into our existing and new customers.
- Opens new markets with commercialized innovative products.
- A prime consideration in our evaluation of a business or product-line is the state of the product, tech-stack, R&D practices, and investment history.

INVEST

- Robust, customer and industry driven R&D program per product.
- Identify common themes that could lead to knowledge sharing and synergy across product groups.
- 10% of revenue reinvested – variable by product line in any given year. ROI factored into assessment of relative merits of proposed investments.
- Investigate adjacencies: by ecosystem; by product; by territories; and by market

BUILD

- Products: extending products (e.g., flexible mobile app for self care, remote workforce, sales agents etc.)
- Processes: improve the way things are done and spread learning among delivery groups.
- Technologies: keeping technology stacks current as well as capitalizing on new technologies e.g. Utilizing cloud technologies across the existing product suite.
- Solutions: identifying innovative use of existing capability (e.g., connected car)

Incremental Transformation to Digitally Driven Experiences

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CUSTOMER RETENTION AND THE STICKINESS OF OUR SOLUTIONS.

OUR CLIENTS STAY WITH HANSEN DUE TO OUR APPROACH TO TECHNOLOGY AND CUSTOMER RELATIONSHIPS.

1 Mission-critical software

Our technology is mission critical software, a database of record for products and customers with modern and feature-rich evolving applications:

- We are at the heart of the customer's business; and replacing our software is a heart transplant.
- Our understanding of, and investment in, the future of technology is key to future-proofing our customers.

2 Compliance with regulations

Our technology enables customers to stay compliant with ever-changing regulations and industry standards:

- Energy regulations are highly specific to each country – in Australia and the USA – each state.
- Telecommunication standards are global, but the pace of change is higher.

3 Closely aligned with our clients' needs

Industry leading levels of customer intimacy and relationship management give us an understanding of our clients' needs - we work with them to develop solutions to meet these needs; we don't give them a reason to leave:

- In most product lines customer requested features might constitute anything from 25-75% of any release.
- Our clients appreciate this; it facilitates strong loyalty and information exchange to keep us informed as their needs develop.

4 Thought leadership

Hansen's executive team has >100 years of expertise and experience in communications, IT, business process and management:

- Our global experience across telecommunications and utilities, and acquisition strategy, enables us to cross-fertilize knowledge between regions, industries, products and customers to efficiently adapt our customers for regulatory changes.
- Turning customers from today´s utilities and telecoms into tomorrow's next digitally-driven experience companies.

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CUSTOMER DRIVEN ROADMAP EXAMPLE

In FY21 25% of the roadmap for the Sigma product lines was derived from dialogue with customers over features needed for their specific markets

Catalog:
- Cross Offer Relationship Enhanced Modelling
- Entity Relation Override Extensions
- Catalog Data PLM/Audit Extensions
- Workbench Configuration Audit Extensions
- Management Platform Enhancement
- Partial Group Cardinality Support
- Operational Platform Enhancements

OM:
- BPMN Loop construct
- Enhance Import Product Specification
- User Task Selective display
- Runtime and Designtime UI Enhancements
- Amend on Delete
- UI/UX enhancements

Inventory:
- Custom Search Extensions
- Sigma OM/CPQ Extensions

Insights:
- India KPI Requests
- Japan KPI Requests

DPM:
- Security Hardening
- Replace Oracle with opensource database
- Relay Based Static IP Allocation
- Firmware Management Improvements
- DHCP Memory Improvements
- DHCP Data File Resiliency Hardening
- TFTP File Size Improvements
- DHCP Primary to Failover Sync Improvements

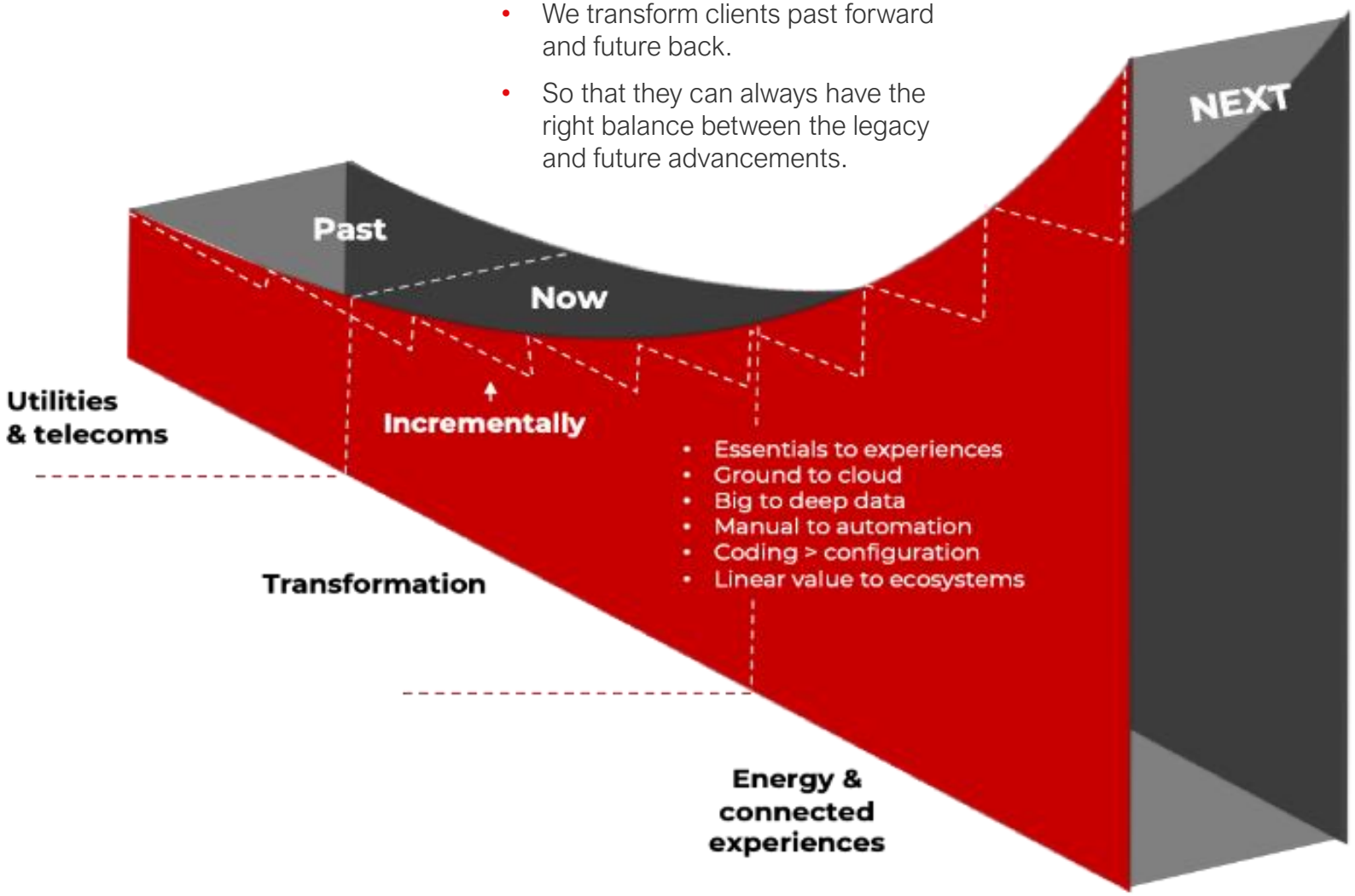
Provisioning:
- Order Search using different indexes
- Large Open running order support
- On Prem Deployment (specific to client))
- Order Repair Functionality
- User Interface - JEA Suspend Resume
- User Interface – Order Capture
- On Prem Deployment (All Customers)
- Catalog Driven Provisioning
- Web based SCT Designer Tool
- Time Line View – Ops UI
- STM UI
- Inventory UI
- Portfolio Inventory Integration Improvement

HANSEN

OUR TECHNOLOGY JOURNEY.

TRANSFORMING CLIENTS FOR FUTURE ADVANCEMENTS INCREMENTALLY AND SUSTAINABLY.

- We transform clients past forward and future back.
- So that they can always have the right balance between the legacy and future advancements.



- We have always believed in incremental innovation and co-development instead of hyped disruptions. We believe that model is more affordable, feasible and sustainable.
- Another strong element we can bring to support the success and speed of transformative journeys is our solid ground-2-cloud and global-2-local expertise and knowledge.

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SOME GENERAL POINTS ON R&D AT HANSEN.

OUR CLIENTS HAVE AN EXPECTATION OF CONTINUED ROADMAP INVESTMENT.

1 **R&D approach**

Hansen has made eight product-oriented acquisitions in the last seven years:

- Most of these clients have an expectation of continued roadmap investment.
- Synergies are achieved from shared services, knowledge, and components.

2 **Three-year horizon**

Roadmaps are planned on a three-year horizon:

- Year 1 is committed in the form of a Product Charter - a Plan of Record that we strive to meet.
- Years 2 and 3 are Plans of Intent.

3 **Closely aligned with our client's needs**

Roadmaps are closely aligned with our client's needs which are understood and aligned:

- Through periodic workshops.
- Annual or bi-annual Hansen Connect networking events.
- Roadmap (Feature) Sponsor programs.

4 **Agile development processes**

Agile development processes are practiced throughout the company; release cadence varies by product:

- Cloud-native, multi-tenant solutions: one - three months.
- Full-stack on-premise solutions: six - 18 months.

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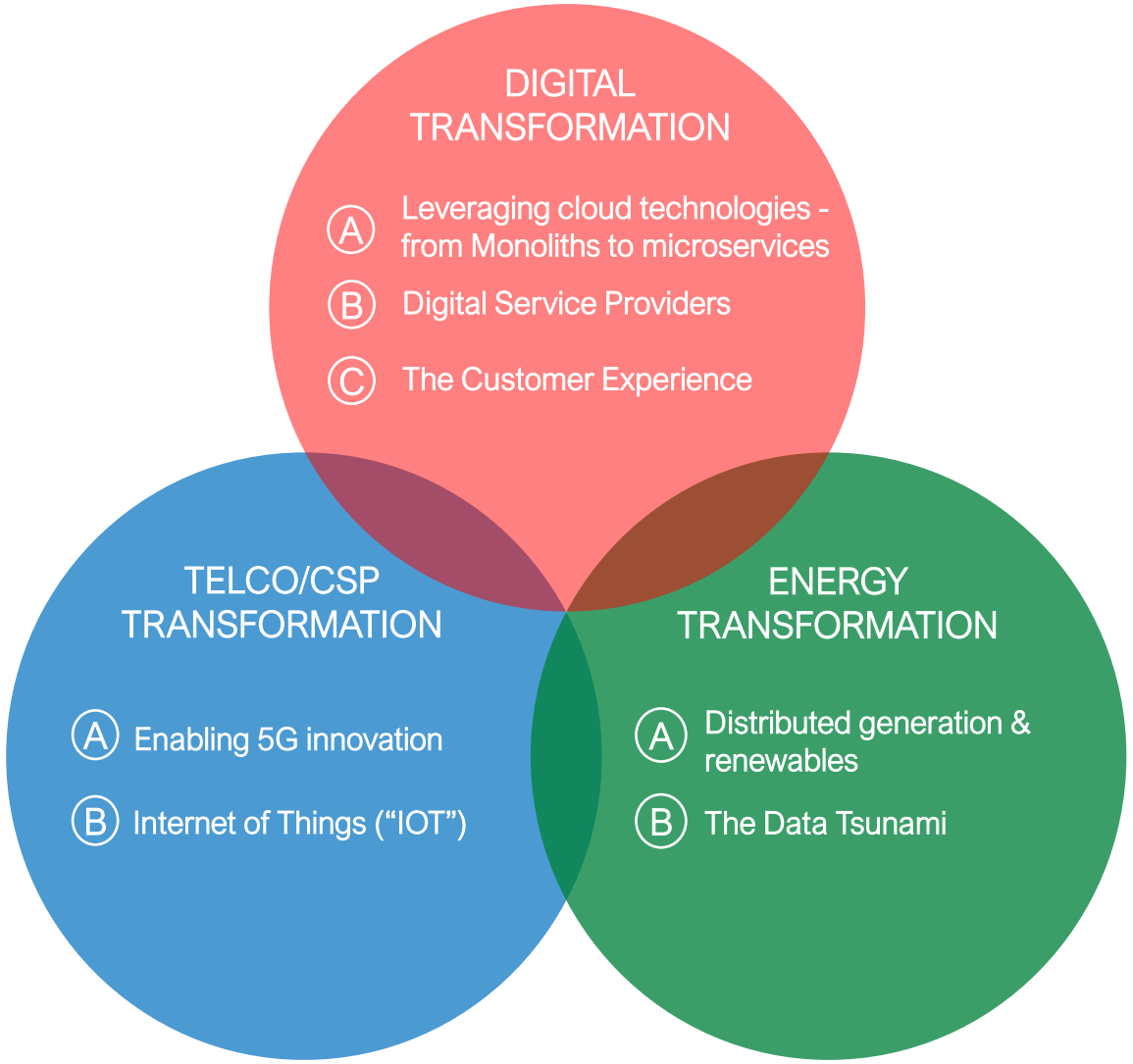
KEY THEMES IN HANSEN ROADMAPS.

WHILST MOST PRODUCT LINES HAVE A DISTINCT WISHLIST THERE ARE CERTAIN CORE THEMES THAT ALL CLIENTS HAVE IN COMMON.



Technologies changing the way a business operates

Disruptors changing the nature of the industry itself

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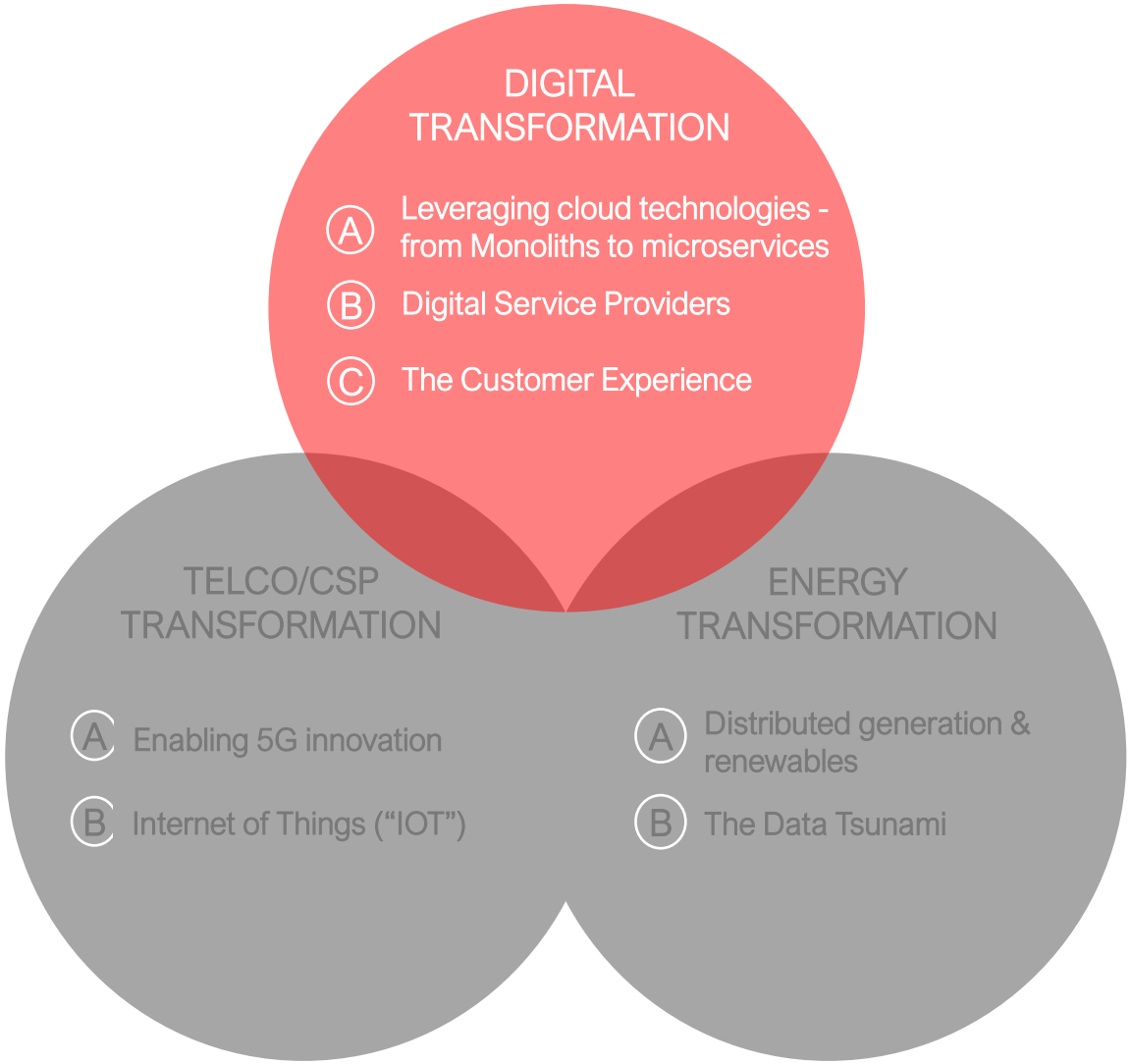

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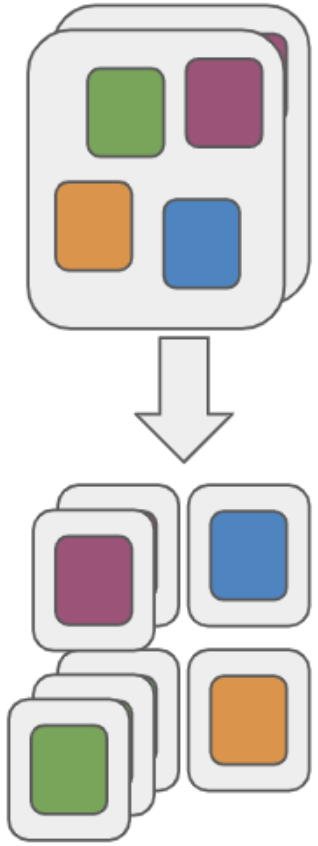
FROM MONOLITH TO (MICRO)SERVICES: LEVERAGING CLOUD TECHNOLOGIES.

Billing and Customer-Care solutions evolved over decades to satisfy all the requirements of the organizations they served:

- Complex and wide-ranging solutions that try to be all things to all people.
- Serving multiple different groups of users with different job functions.
- Scaling up generally requires expensive hardware & 3rd party software .
- Options to mix and match systems are limited.

Large systems like this have acquired the name “Monoliths”.



A more recent design pattern is to decompose monolithic systems into a loosely coupled set of distributed services that interoperate with each other but can be scaled and managed independently.

These architectures are known as Service Oriented Architectures (SOA).

Services:

- Contain and manage own data.
- Can be updated independently.
- Communicate with each other through API’s.
- Can be scaled by adding more into the pool.

Microservices are a more fine-grained evolution of the SOA concept usually built using cloud-native technologies.

Hansen is investing in knowhow, technology, and processes that will provide our clients with access to the best of what the cloud has to offer without the pain of system replacement.

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HANSEN PRODUCTS AS A SUITE OF LOOSELY COUPLED SERVICES.

EACH INDUSTRY REQUIRES CERTAIN UNIQUE SERVICES, BUT MANY FUNCTIONS ARE COMMON TO BOTH.

HansenCreate-Deliver-Engage™
for Communications Services Providers

HansenOM™
Commercial and Technical Order Über-Orchestration and Fulfilment Management

HansenPortfolio™
Installed Product, Service and Resource Inventory Management

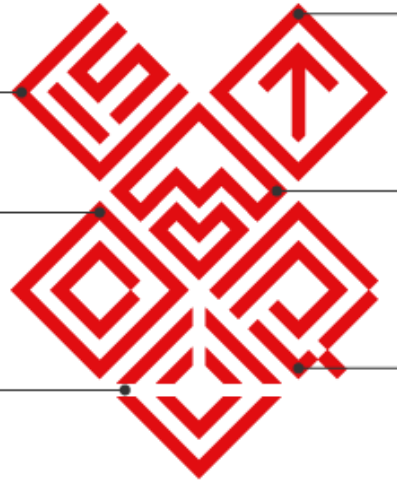
HansenCCB™
Convergent End-to-End Customer Care and Billing for CSPs

HansenCPQ™
Cross-Market / Omni-Channel Quote and Order Capture

HansenCatalog™
Commercial Product and Technical Service Catalog and Lifecycle Management

HansenProvision™
Network Service and Device Activation

HansenCreate-Deliver-Engage™
for Energy and Utilities Providers



HansenCIS™
Commercial off the shelf Customer Care and Billing Lifecycle Management

HansenCatalog™
Commercial Product and Technical Service Catalog and Lifecycle Management

HansenInsight™
Business and Operational Data Analytics and Decisioning

HansenTrade™
Automated trading Analytics and Risk Management

HansenMDM™
Metered AMI, Calculations and Disseminating Event Management

HansenCPQ™
Cross-market Omni-channel Quote and Order Capture

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HANSEN CLOUD EVOLUTION.

CLIENTS PERCEIVE VALUE IN THE ADOPTION OF CLOUD TECHNOLOGIES/METHODOLOGIES BASED ON KEY EXPECTATIONS.

1. Lower Total Cost of Ownership
2. Greater agility = faster time to market
3. Increased resilience, redundancy, best-of-breed security
4. Scalability and elasticity

Some customers approach transformation incrementally - “all new systems must be cloud-native” while others plan a more radical IT transformation.

Hansen has established general guidelines for all product lines to follow with knowledge and experience shared between groups

Provide Evolutionary Upgrade Path

Keep external APIs and business configuration paradigms constant

Utilize “Standard” Cloud Native Technologies and Services

Deploy on Public Cloud or On Premise

Unlock Scalability

Dynamic support for hundreds of txns/sec
Microservices architecture as appropriate per application

Improve Agility

Separate Core from Implementation
Standard CI/CD Process
Realize in Product and Project

Consistent deployment & operations

Logging, eventing, operational metrics, tracing

Lower TCO

Reduce dependence on expensive legacy technologies. Streamline operations required to support infrastructure

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HANSEN AS A DIGITAL SERVICE PROVIDER.

AS MORE DIGITAL PRODUCTS ARE SOLD, THERE ARE GOOD OPPORTUNITIES FOR SYNERGISTIC BUNDLING .

Overview

- CableTV companies and Telco's have proven that the "triple-play" bundle (TV, internet, VOIP) reduces customer churn. Later (in 2010's) mobile telephony was added to the mix, with further benefits for subscriber retention.
- As an ever-widening array of digital products are brought to market, there are good opportunities for synergistic bundling providing back-office solutions can support them.

Back-office requirements

1 Product Catalog	That enables service and product innovation - describes all the elements of the bundle, and all the resources on which they depend.
2 CPQ systems	An omni-channel customer acquisition process capable of generating complex quotes, applying discounts, and capturing orders.
3 API's and frameworks	API's and frameworks for the integration of Partner systems.
4 Orchestrating orders	Capable of orchestrating orders to a customer through multiple internal systems as well as through 3rd parties.
5 Charging and billing	Real-time enabled charging and billing for Own and 3rd party products.
6 Analytics	Analytics driven ecosystem, to foster real-time decisioning, personalization and operational efficiency.

Examples

Direct Energy	Uses PeaceCX to bill non-commodity offerings such as home services, equipment maintenance and insurance for more than 500,000 customers in the competitive Texas energy market.
Wilhelm.Tel	Services 36,000 homes, while providing fiber to a further 130,000 homes in six adjacent municipalities.
City of Longmont	Services 86,000 homes with electricity and water as well as community broadband (gigabit fiber called Nextlight). Longmont is an example of a growing trend in rural American towns to use Municipal Bonds to finance broadband as a utility.

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CUSTOMER ENGAGEMENT.

A HEIGHTENED FOCUS ON THE OMNICHANNEL EXPERIENCE IS KEY TO DIGITAL TRANSFORMATION FOR ALL CLIENTS.

UX upgrades

Hansen has an ongoing program of customer experience improvement initiatives on many product lines:

- Streamline dashboards and workflows.
- Leverage latest technologies.
- Allow customization and extension of the UI through SDK's.

Self-service apps and portals

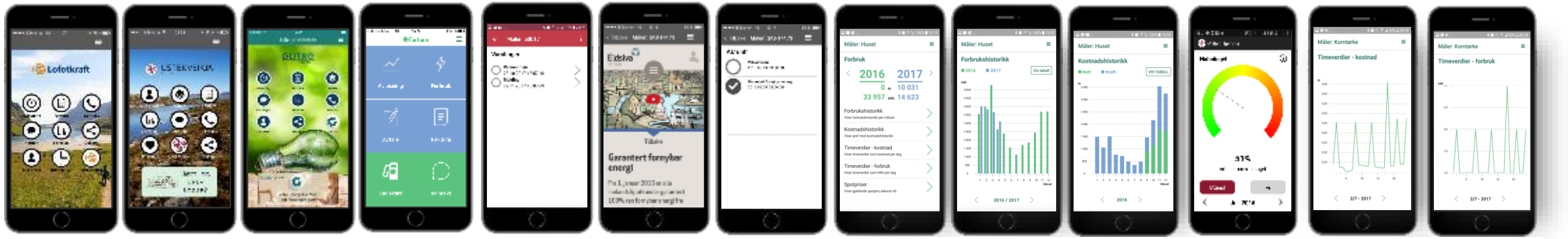
As consumers and households increasingly shift towards being "digitally native", focus shifts from call-centre to self-service:

- A personalized omni-channel experience is key to customer engagement and retention - all of Hansen's product lines are evolving an increasingly powerful set of RESTful APIs to interface with multiple external channels.
- Hansen provides white-label websites and apps for many of our smaller Utility/Muni clients in various markets.

Mobile first

Last year Hansen developed a universal Framework for use in all our mobile self-care and business apps going forward:

- A single code base for Android and IOS apps.
- Best of breed design patterns with integrated security, authentication, testing, crashlytics…etc .
- Targeted at business apps (field service personnel, inventory testing) as well as our consumer facing apps going forward.
- In FY22 we will be refreshing consumer facing self-care apps that interoperate with several of our products.



Hansen has appointed a Head of Customer Experience Management to oversee all these initiatives from the Office of the CTO

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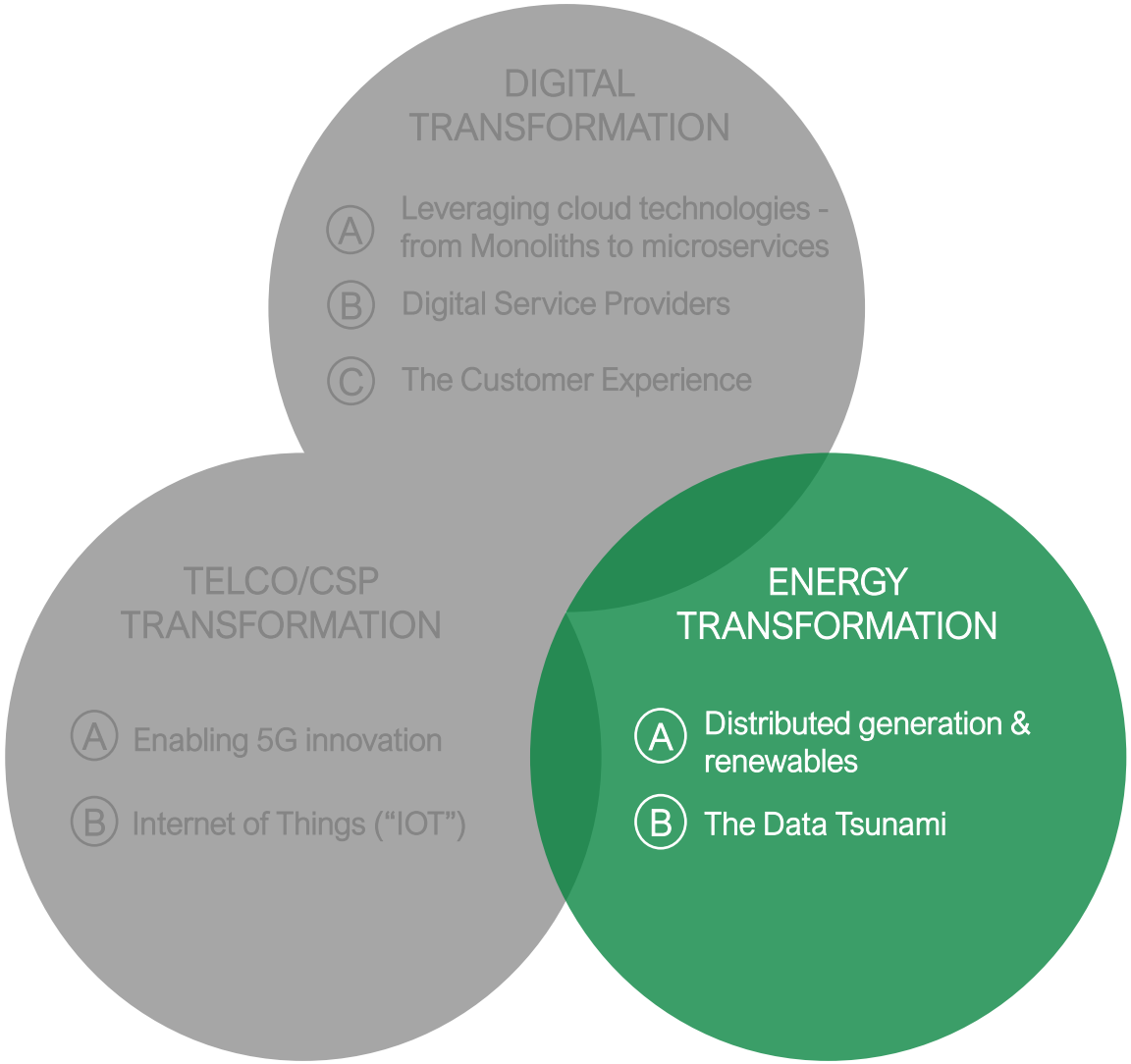

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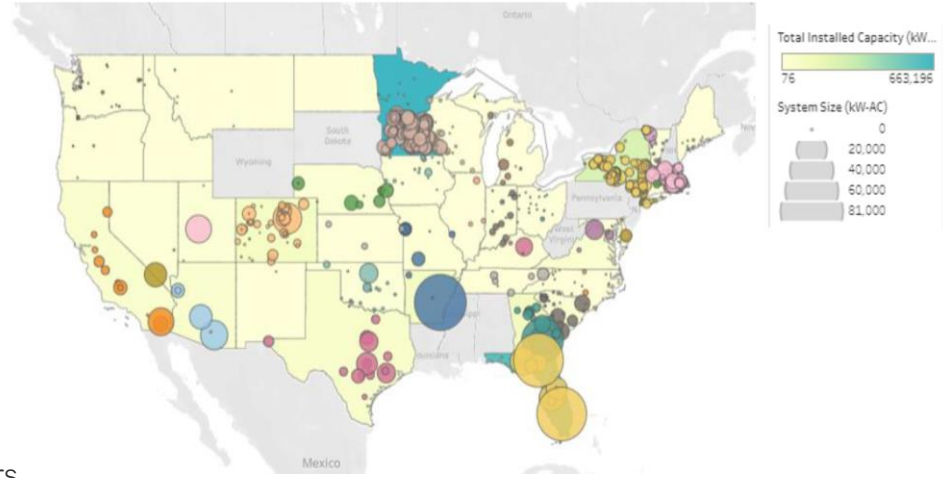
DISTRIBUTED GENERATION & RENEWABLES.

HELPING COMMUNITY INITIATIVES THAT TARGET CUSTOMERS IN DEMOGRAPHICS SO FAR EXCLUDED FROM GREEN-TECH.

Community solar in the US

- After strong years of growth on behind-the-meter rollout of solar and storage (including EV's), Hansen is currently focusing on community initiatives that target customers in demographics previously excluded from green technology.
- In the US 3,005 MW (Dec 2020) of Community Solar capacity has been installed in >1,250 projects in 39 States; Steady market growth since 2010 (130% CAGR)**
- Subscribers typically save 5 to 15% while also supporting renewable energy and the environment
- Increased access:
  1. Gives renters and apartment dwellers the ability to participate in solar or wind.
  2. Mostly focused on Low to Medium Income (LMI) homes.
  3. More suitable for those that plan to change utility service territory in the next 20-25 years
  4. Zero maintenance.
- Energy Independence – protection from unstable energy prices and supply disruptions.



**NREL.gov

Challenges and CIS roadmap response

- ✗ Cumbersome regulatory processes for verifying the eligibility of LMI customers.
- ✗ Long lead times between sign-up and capacity coming online.
- ✗ Varying delays in application of credits to 2nd bill depending on Utility.
- ✗ Mobile population, frequent churn due to change of address.

- ✓ Streamline customer onboarding processes, integrate verification systems.
- ✓ High touch communication on project milestones and what to expect when.
- ✓ Clear and well explained bill formats, clear self-care application.
- ✓ Simple move-in/move-out processes, maintenance of waiting lists, application of credit .

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THE DATA TSUNAMI: LESSONS FROM THE NORDIC REGION.

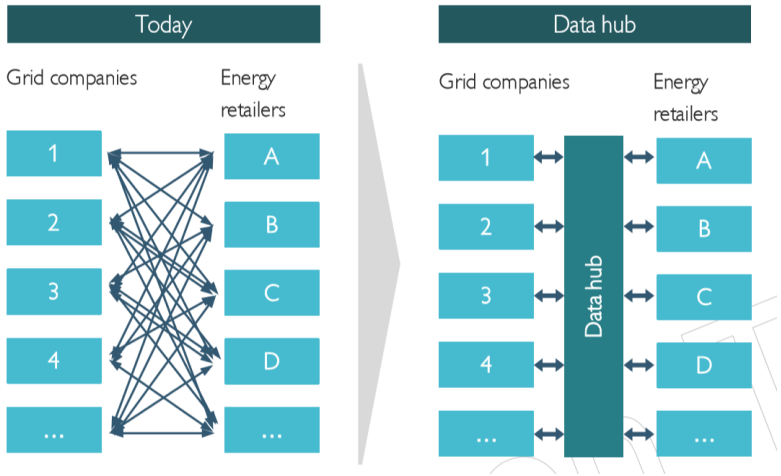
HIGH SMARTMETER PENETRATION AND DEREGULATED ENERGY MARKETS ARE CREATING CHALLENGES & OPPORTUNITIES.

- With smart meter penetration near ~100% in Finland and Norway, our customers are having to cope with a deluge of usage data necessitating upgrade to systems and storage.
- Exchange of all this information is complex which has prompted regulators to mandate centralized (regulated) datahubs through which all participants must communicate.
- Standardized SLA's for smartmeter data VEE, submission and retrieval.
- Force a cleaner separation between market participants (DSOs, retailers).

Consequences

- Launch of Norwegian "elHub" in 2019 lead to a wave of consolidation, particularly in the DSO segment.
- Finland launches their datahub in Feb 2022. (Swehub plans are under review).
- ➢ **CIS:** Hansen is leveraging Norwegian "Elhub" experience to increase market share in Finland.

Distributors, Retailers & Datahubs



Smartgrids and datahubs have generated further opportunities for Hansen - we have launched 3 new cloud-native products

1 Meter & Energy	• A new cloud-native MDMS product, designed to work with datahubs and shaped around the independent needs of DSOs and retailers.
2 Utilytics	• Analytics suite that uses combined datasets to increase understanding of customers, demand patterns and network performance.
3 Energy Trading	• Turning knowledge into actionable insights and forecasts that inform automated intraday energy trading in the Nordpool market.

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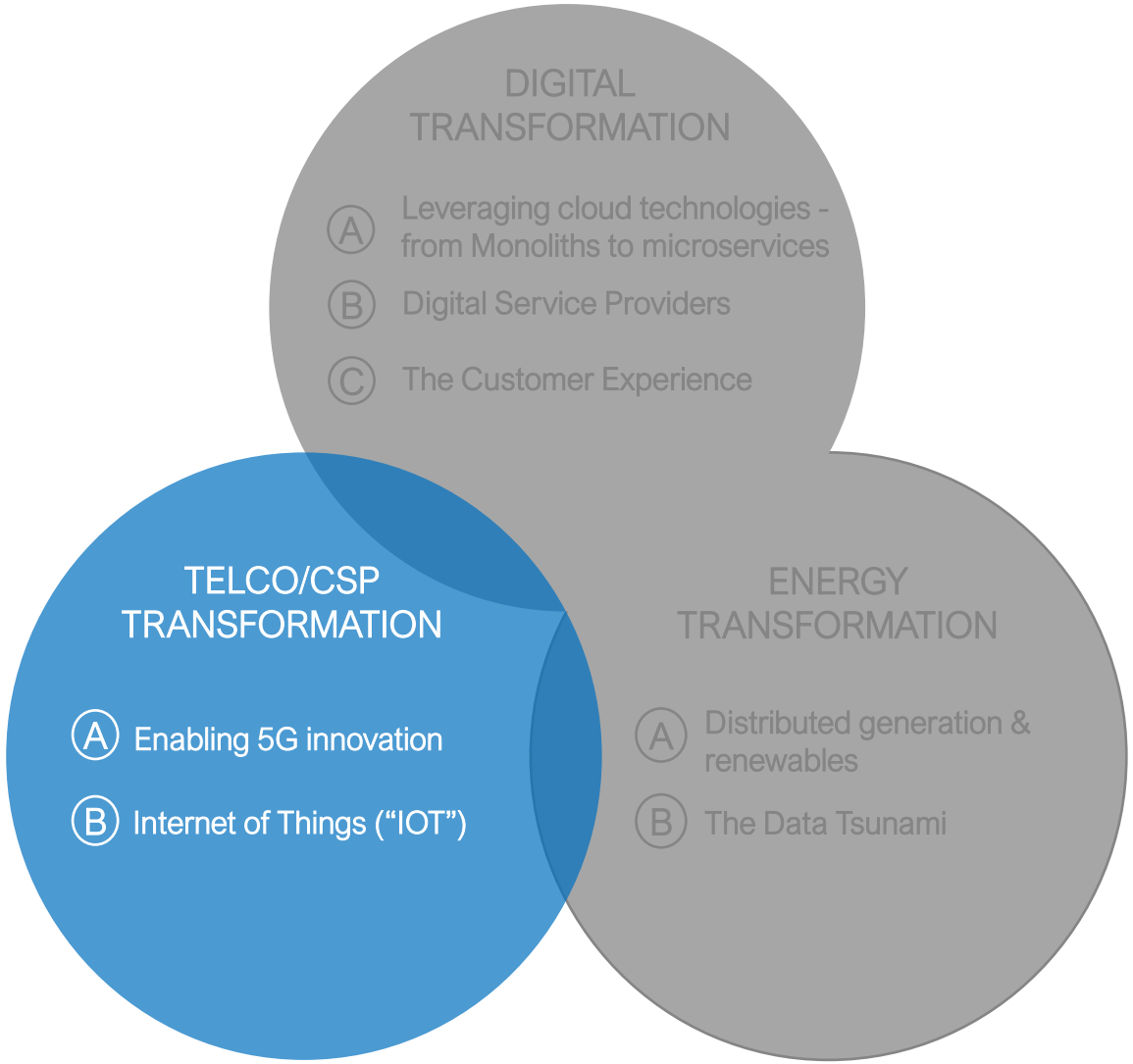

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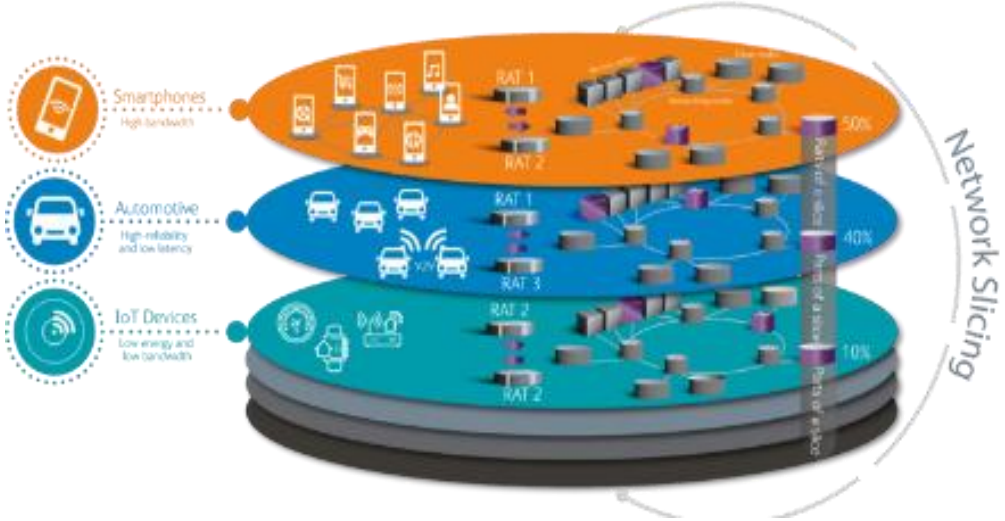
ENABLING 5G INNOVATION: THE B2B OPPORTUNITY.

WHILST 5G WILL OFFER CONSUMERS EVEN FASTER NETWORKS , CSP'S SEE RETURN ON INVESTMENT COMING FROM THE B2B MARKET.

Fundamental to 5G networks is the ability to create "network slices" for industries, partners and institutions such as Smartcities, healthcare providers, transportation fleets, manufacturers, retail chains, gaming communities, etc.:

- In which specific parameters like **QoS, speed, latency and device density** can be fine-tuned, measured and guaranteed.
- And operated on a network comprised of software functions rather than dedicated switches and hardware. This allows the addition of new functions that can scaled with the same ease as public cloud providers can offer – so-called **Network Function Virtualization** (NFV).
- Which facilitates bundling of a new set of **value-added services** from partners e.g., a VPN for a multi-site business.



A flexible way to describe, price, bundle and discount services is key to success – hence Hansen's Create Deliver Engage Suite.

Diagram from viavisolutions.com

Roadmap initiatives

Enterprise quotes & orders	• New use cases and functional capability are being added to CPQ and Order Management to enable functions like tiered and threshold pricing; partial order submission; entity level PONR; ability to manage linked entities; enhancements to pricing and discounting; price and product guarantees, etc.
Bulk/large orders	• Large orders from large enterprise customers place special demands on all components in the suite – for example capturing data necessary to provide 10,000 Site VPN networks. Many aspects of UI and API functionality are being improved: user journeys; searching within orders; bulk data upload.
Framework contracts	• Providing B2B and Large Enterprise customers the ability to negotiate umbrella pricing and product variations for enterprise customers. Framework agreements subsequently utilized within all further Quote and Order processes
Better performance	• Larger quotes and larger orders create special data loads on existing API's and the underlying services that support them. Mechanisms are being defined to optimize communication of large files and streamline information flow so that customer facing processes are remain quick and reliable.

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ENABLING NEW RETAIL EXPERIENCES: THE INTERNET OF THINGS.

THE PROLIFERATION OF APPLICATIONS FOR CONNECTED DEVICES PRESENTS CHALLENGES AND OPPORTUNITIES FOR CSP'S.

The cellular IoT market was valued at $1.15 billion in 2017 and is expected to register a compound annual growth rate of 26.7% through 2026**.

Whilst key verticals like the automotive industry are serviced by dedicated teams, a key issue for CSP's is how to enable small businesses to prototype, trial and launch new services, and then manage their accounts going forward.

- There needs to be way to discover, order, and enable sensors, devices, services and rate plans.
- The order process must be integrated into common CRM platforms such as Salesforce and Dynamics CRM, as well as standalone frameworks that can be integrated into the order path and technical ecosystem of existing retail sites.
- A record of customer orders, state of fulfillment and contract terms must be provided.
- Analytics must be integrated seamlessly with rated usage to enable reconciliation processes.
- Which need to shared through Partner Portals.

Hansen is updating and extending capability to accommodate these requirements.

**Persistence Market Research.

Examples

Large US Carrier	• Functionality that serves one of the USA's largest networks to offer a partner portal to the SME market
US Fibre Network	• A retail front end for the signup and sale of broadband fiber to homes and SME's in the USA.

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SYNERGIES: BETWEEN INDUSTRIES AND TRENDS.

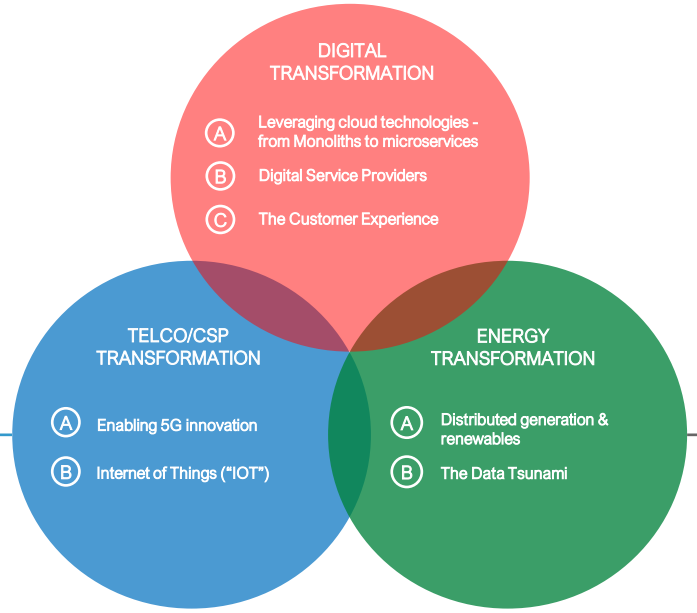
OUR THREE INTERSECTING CIRCLES REPRESENT AN OVERLAP BETWEEN INDUSTRIES AND TRENDS.

Communication Service Providers

- Seen a massive shift from voice, messaging, and broadcast TV, to OTT services that piggyback off their network.
- Fighting commoditization by adding value added services to sub-segments of their customers: healthcare, energy & utility etc.
- Which requires bundling, pricing, partnering, provisioning - beyond the capabilities of what their technology ecosystems were designed for.
- This leads to a demand for systems that enable innovation and interoperate well
  - Systems with API's, driven by flexible product descriptions, working well as a Product Suite.
- And components that allow our customers to present their customers with the best, most personalized experience possible.
  - Analytics, actionable insights, holistic views.

Personalizing the customer experience

Leveraging greater efficiencies



Cross-selling products

Cross-selling services

Energy and Utilities

- As strategic national resources they are subject to shifting regulatory environments and increasingly strong public pressure driven by climate change concerns.
- Renewables behind-the-meter (solar, storage & EV's) and community renewables (solar & wind) which are now at price parity with traditional forms of energy generation.
- Enabling these changes requires a smartgrid, and with it, the ability to measure, aggregate, utilize and leverage large volumes of data to provide richer customer experiences and better service.
  - Systems that enable insight to usage so that customers can modify behavior to consume at periods of low demand
- And connectivity: to measure everything, engage customers, and ultimately retain them by making them feel part of an energy transformation.

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IN CONCLUSION.

Our expanding geographic footprint, coupled with our increasingly broad experience in our focused verticals, gives us a unique vantage point from which to provide a viable pathway to evolving organizational capability:

- Our R&D program is robust and tailored closely to our clients' desires.
- Our approach is one of incremental investment paced at the rate our clients expect.

Our R&D investment exceeds 10% of Hansen's current revenue. Ongoing focus on low-cost development centers increases the value we realise from that investment.

Our industries are infrastructure - the essential fabric on which our nations are built.

The central placement of our products in our customer's ecosystem presents opportunities to expand within accounts and identify areas of additional value add:

- To service with new products.
- To focus our Mergers and Acquisitions activities.

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Q&A

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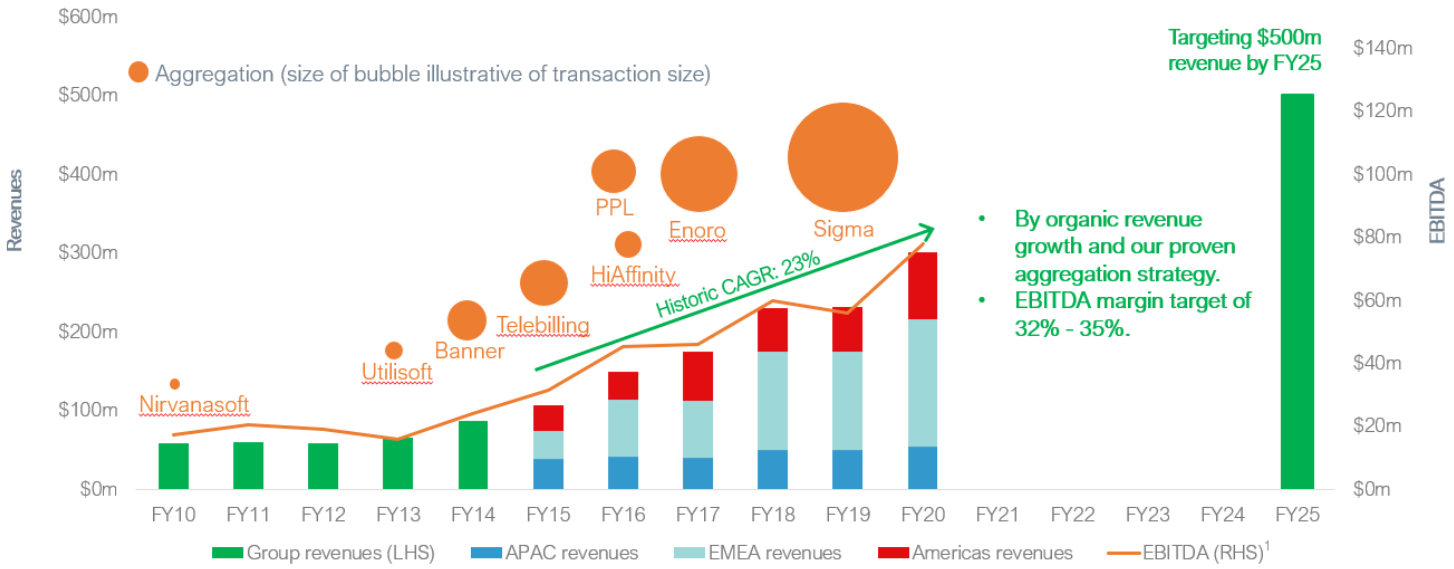
Acquisition growth

18 May 2021

EXECUTIVE SUMMARY.

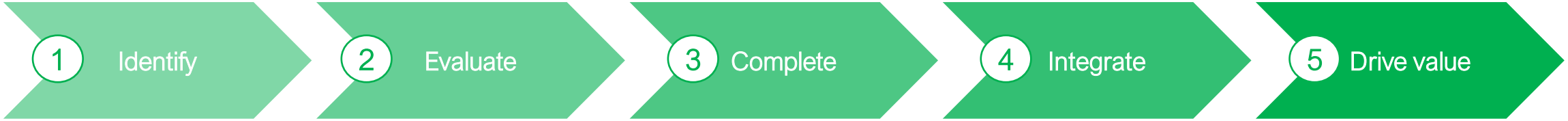
A COMPREHENSIVE ACQUISITION GROWTH STRATEGY BUILDING ON OUR STRONG TRACK RECORD.

Strong acquisition track record



- Long history of >25 value-accretive acquisitions fully integrated.
- Proven ability to acquire larger businesses as our business has grown.
- Significant further acquisition opportunities in fragmented existing verticals and new verticals.
- Structure and process in place to drive value accretive acquisition growth.
- With our latest acquisition (Sigma) fully integrated and performing well (see case study later in presentation), and significant balance sheet capacity given strong cash flows, we are ready and well prepared to acquire and integrate our next value accretive acquisitions.

Maximising value accretion in our acquisition growth strategy



Notes:
1. EBITDA presented as EBITDA adjusted for non-recurring items and net foreign exchange gains (losses).

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1. STRUCTURED ACQUISITION IDENTIFICATION PROCESS.

PROACTIVE AND COMPREHENSIVE PROCESS TO IDENTIFY ALL RELEVANT OPPORTUNITIES GLOBALLY.

1 **Internal M&A team**

- Focused internal team researching potential acquisition targets.
- Includes those in existing database, new research and opportunities presented by external advisors.
- Weekly internal discussions with executive team to review new targets and discuss existing processes.

2 **External advisors**

- Established relationships with >40 brokers and advisors around the world in the Enterprise Software space and industry verticals with quarterly catch-up meetings on developments in markets and potential acquisition targets.
- Proactively building on this with new brokers and advisors being contacted to further strengthen relationships with key firms and individuals.
- Generating a significant flow of opportunities.

3 **Buy side relationships**

- Firms actively reviewing the market for Hansen on the buy side for new acquisition opportunities.
- Weekly calls held to progress opportunities.

1 Identify → 2 Evaluate → 3 Complete → 4 Integrate → 5 Drive value

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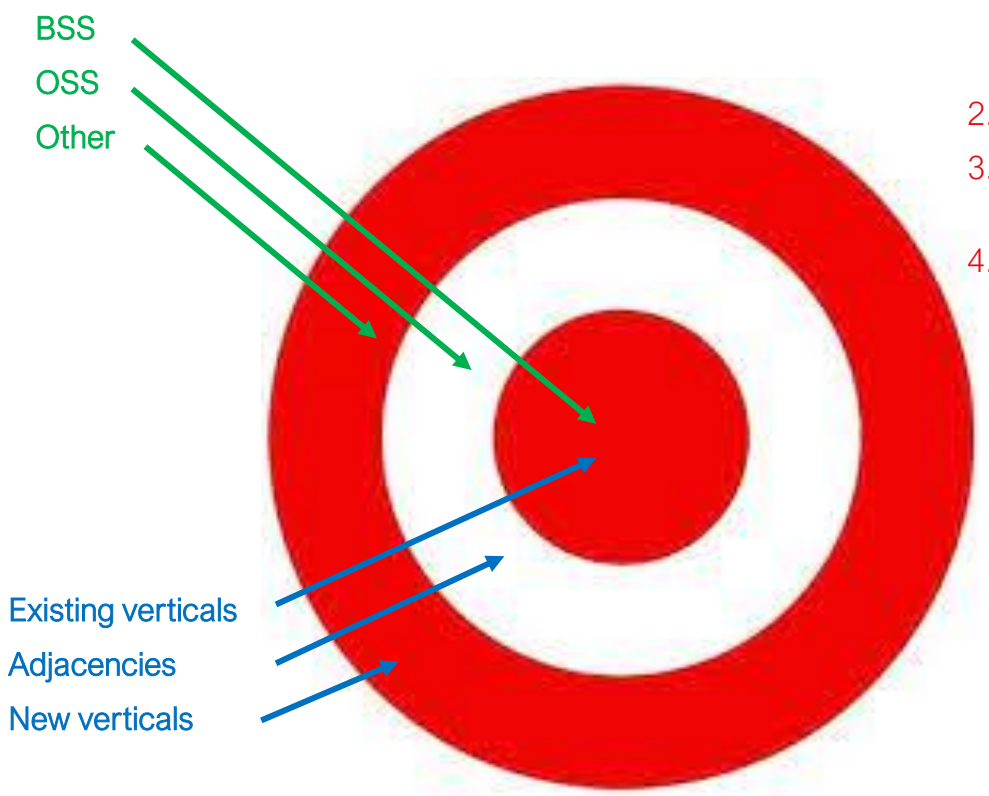
2. DRIVEN BY PROVEN EVALUATION APPROACH.

A STRUCTURED APPROACH TO TARGET IDENTIFICATION AND EVALUATION.

A clear evaluation criteria…



1. Mission critical software in the utilities and communications verticals.
2. Ownership of IP.
3. Mature and predictable Tier 1 and 2 customers.
4. Regional expansion or leverage.

… backed up by our experience

1. We know what we are looking for
2. Open minded about product / competency adjacencies and size
3. We will not look too many "rings out from the bullseye"
4. Quick to evaluate, respond and move forward
5. Experienced due diligence team and process

1 Identify → 2 Evaluate → 3 Complete → 4 Integrate → 5 Drive value

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3. EXPERIENCE IN COMPLETING ACQUISITIONS.

HANSEN HAS THE TRACK RECORD, EXPERIENCE AND SPEED TO EXECUTION TO SUCCESSFULLY COMPLETE ACQUISITIONS.

1 EXPERIENCE

- Executive team that has working together on tens of acquisitions.
- Understanding of critical factors for Hansen to successful closing of acquisitions.
- Experience both in process or outside of process.

2 TRACK RECORD

- Successful track record of acquisitions provides confidence in our approach to closing transactions.
- Experience in all types of sales and processes (private equity, private sale, owner driver, carve out).

3 LOGICAL HOME

- Given our investment in customers, people and technology, we are the logical home for owner led and carved out businesses.
- New staff quickly become part of the “Hansen family”.

4 SPEED TO EXECUTION

- Experience, focus and decisiveness on targeted acquisitions enables speed to execution.
- Balance sheet strength also facilitates financing certainty and speed.

1 Identify → 2 Evaluate → 3 Complete → 4 Integrate → 5 Drive value

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4. EXCELLENCE IN INTEGRATION.

SYNERGIES CAPTURED BY HANSEN.

Drive all the synergies from the integration

- Drive them as early as possible.
- Ensure they are all maximized.
- Drive the 80/20 benefits.
- Begun during due diligence:
  - Business financial projections.
  - Risk assessment.
  - Evaluate key staff.
  - Plan profitability initiatives.
  - Price businesses as stand alone, margin gains not priced in.

Synergies extracted

- Replicated roles, office, sales, third parties.
- Buying power.
- Economies of scale benefit.
- Revenue synergies (cross-selling, upselling).

Initial 90 days plan

- A structured and focused 90-day plan, including:
  - Messaging to staff and customers.
  - HR, legal and accounting and other shared services aligned.
  - Reporting to talk the same language.
  - Customers and new opportunities review.

1 Identify | 2 Evaluate | 3 Complete | 4 Integrate | 5 Drive value

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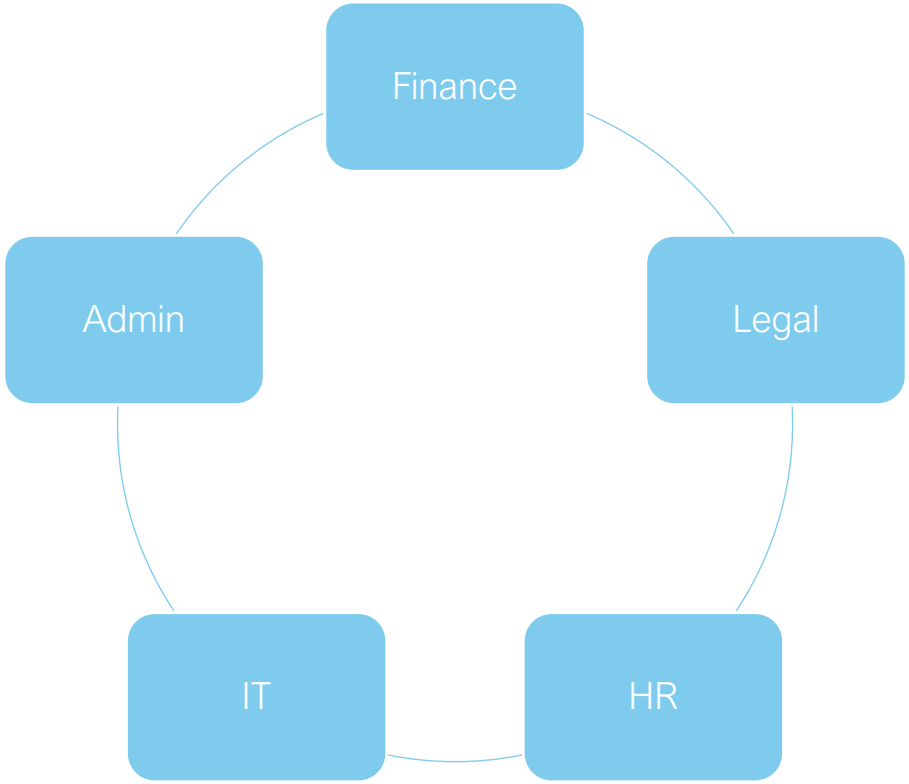
4. EXCELLENCE IN INTEGRATION.

SHARED SERVICES – A STRONG PLATFORM FOR FUTURE ACQUISITION INTEGRATION.

Global shared services and common systems



- Proven model
- Well established global structure of corporate services
- Change driven and completed in 90-day plan

1 Identify | 2 Evaluate | 3 Complete | 4 Integrate | 5 Drive value

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4. EXCELLENCE IN INTEGRATION.

"HANSENISATION".

1 REGIONAL STRUCTURE

- Business structured by region (Americas, EMEA, APAC).
- Sales and Account Management
- Driving growth.
- Structured to take on local and/or global additions.

2 ACCOUNT MANAGEMENT

- Key Hansen Function.
- Long standing relationships.
- Understand the contractual obligations.
- Deliver but not over deliver.
- Establish regular review meetings
- Build trust and relationship.
- Provide opportunity to upsell and cross sell.

3 DELIVERY MANAGEMENT

- Separate from Account Management.
- Provide two voices for each client.
- Triangulation.
- No surprises.

4 PRODUCT MANAGEMENT

- Each product runs with a General Manager.
- Responsible for all delivery obligations.
- Product P&L and Gross Margin targets.
- Well established structure than easily enables addition of further product streams.

5 PRODUCT INVESTMENT PANEL

- Driven by Office of CTO.
- Quarterly review.
- Drives more focused product investment and delivery outcomes.

6 LOW-COST DELIVERY CENTRES

- Well established capability in Pune, Ho Chi Minh and Shanghai.
- Expertise and experience to roll out capability to further products as required.

UNDERLYING ETHOS

1. Customer focus
2. Create responsibility
3. Enable ownership
4. Spend money like it is your own

1 Identify → 2 Evaluate → 3 Complete → 4 Integrate → 5 Drive value

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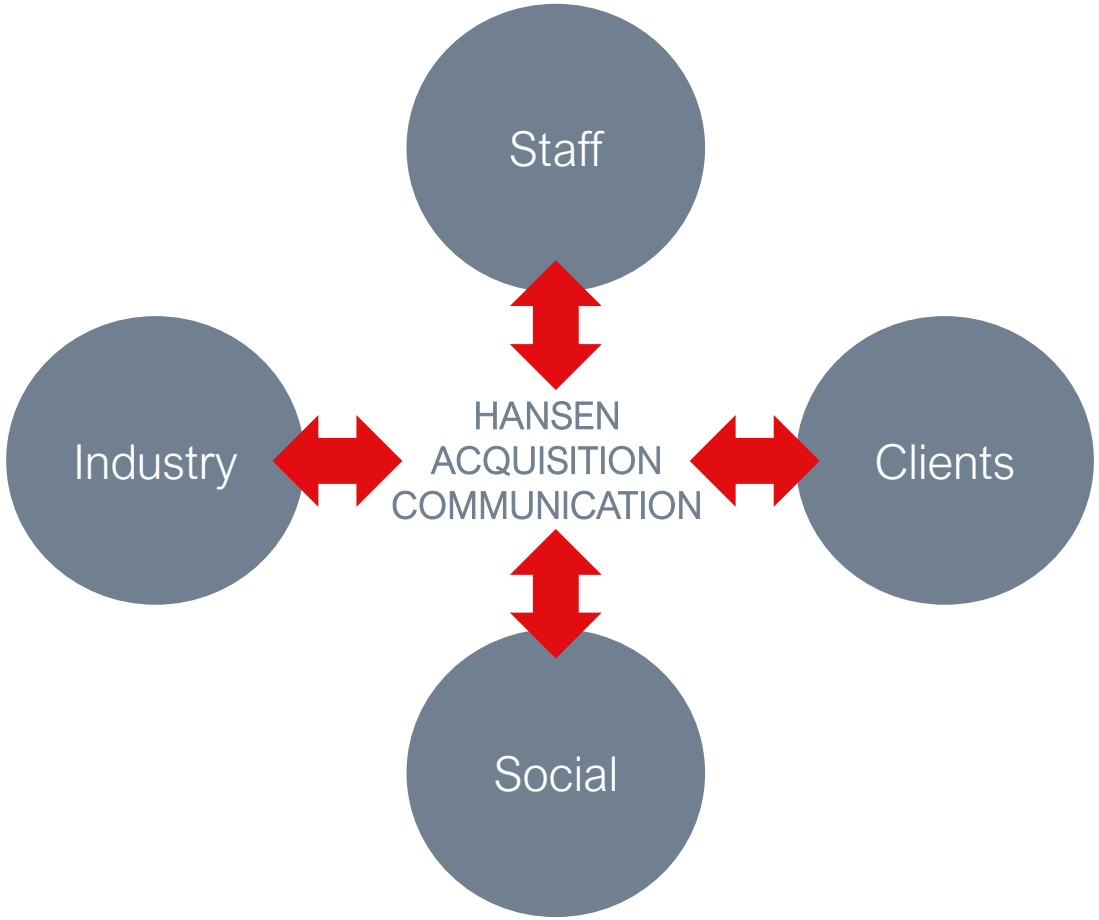
4. EXCELLENCE IN INTEGRATION.

COMMUNICATION – SMOOTH INTEGRATION FOR STAFF, CLIENTS AND PARTNERS.



1 INTERNAL

2 EXTERNAL

3 DAY 1

4 ONGOING

1 Identify | 2 Evaluate | 3 Complete | 4 Integrate | 5 Drive value

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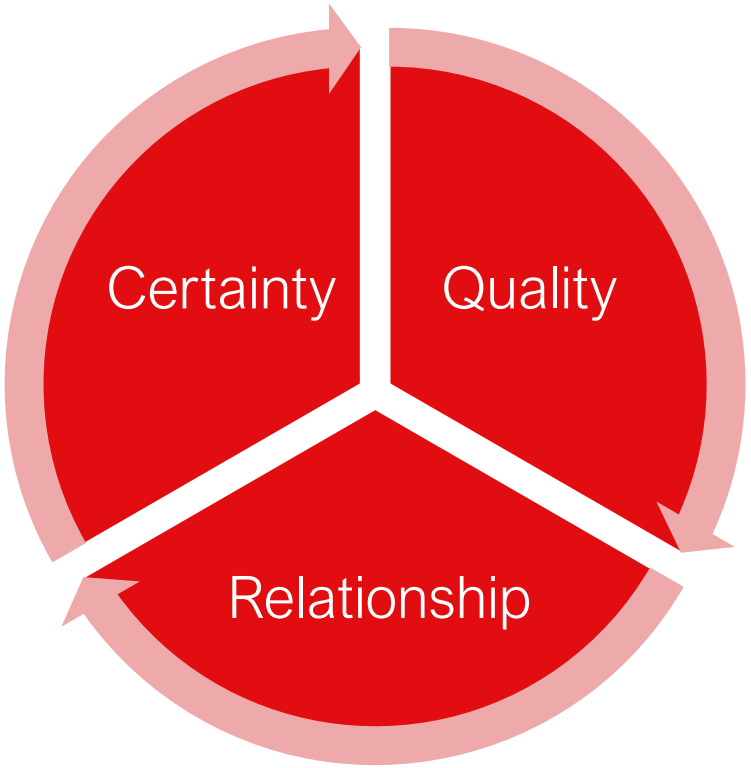
5. DRIVING VALUE.

ONGOING VALUE CREATION.

Hansen value creation

1. PROFITABILITY
2. PRICING POWER
3. UPSELLING
4. CROSS-SELLING

Customer value creation



1 Identify → 2 Evaluate → 3 Complete → 4 Integrate → 5 Drive value

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SIGMA CASE STUDY.

DRIVING VALUE THROUGHOUT THE ASSESSMENT, DILIGENCE, NEGOTIATION AND INTEGRATION PROCESSES.

PRE-DEAL ASSESSMENT

1. Adjacent product.
2. Nice synergy and cross-sell BSS to OSS and OSS to BSS.
3. In Telco vertical but cross-selling potential into Utilities.
4. 5G / digitization / IoT potential
5. Additional low-cost development centres to complement our existing centres.
6. Tier 1 clients.
7. Disciplined approach to valuation negotiation – right price.
8. Private equity seller considered Hansen a good home.
9. Significant savings opportunities.

INTEGRATION

1. 90-day plan executed driving 80/20 synergies.
2. Shared services integration.
3. Account management.
4. Delivery management.
5. Product management.
6. Product investment panel.
7. Low-cost development centres.

DRIVE VALUE

1. Drive value through:
   A. Customer relationship focus and development.
   B. Profitability.
   C. Upselling.
   D. Cross-selling.
2. Lessons learned:
   A. Integrate more quickly.
   B. Proven cross-selling opportunities.
   C. Best practice application.

Playbook for future acquisitions

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Q&A

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WHAT YOU HAVE IN HANSEN.

- ✓ Established in 1971.
- ✓ A highly proven and talented Executive management team.
- ✓ A predictable and cash generative focused business.
- ✓ Owners of pre-eminent software IP at the very heart of our customers.
- ✓ Serving mature and established industries.
- ✓ High barriers to entry.
- ✓ Subject matter experts in our field.
- ✓ 97% of all revenues derived from our software.
- ✓ Track record of >30 very successful acquisitions.
- ✓ A play book for aggregation of a largely regionalised and disparate competitors.
- ✓ A great future ahead.

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POWER THE NEXT.™

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